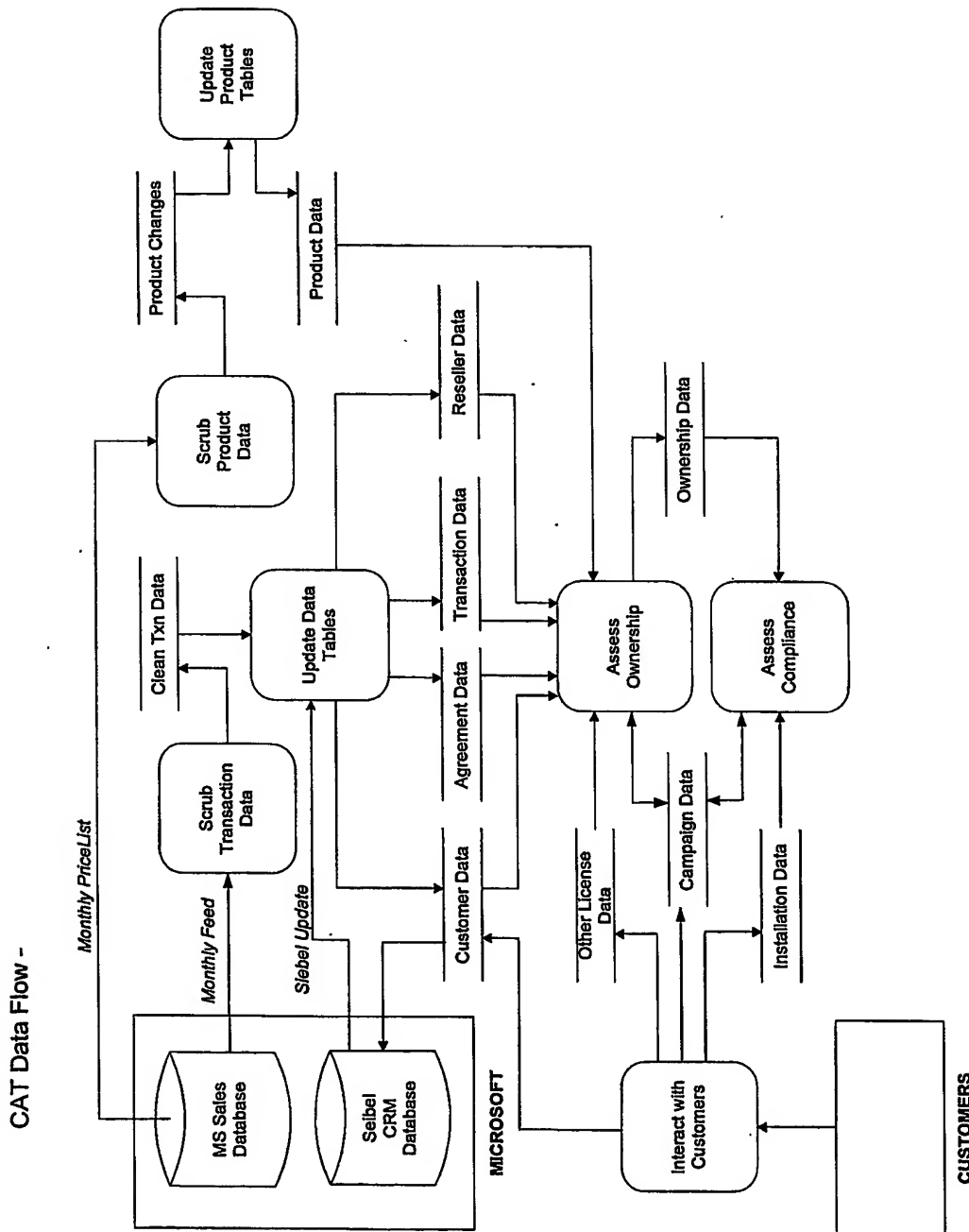


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Figure 1



BEST AVAILABLE COPY

BEST AVAILABLE COPY

Address: http://www.accordo.co.nz/CAT\_Test/CAT.asp - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search History

Address: http://www.accordo.co.nz/CAT\_Test/CAT.asp

COMPLIANCE ANALYSIS TOOLSET 1112117 - XYZ COMPANY

Upper Mid-Market 1 of 104 Choose Customer

## Compliance Analysis Toolset Site Map

This Site Map shows the major functions of the CAT system. The Quick Menu displayed to the left provides continuous access to the features activated in this test system. The features listed in the various sections below provide links to active screens in some instances, and in other cases provide a link to a description of how the feature will work when activated.

| CUSTOMER VIEW  | RESELLER VIEW  | PRODUCT VIEW   | SALES & MARKETING VIEW  | OTHER MODULES  |
|--|--|--|---|--|
| MS Sales Overview<br><i>Key indicators from MS Sales trans</i>                     | Reseller Overview<br><i>Key indicators from MS Sales trans</i>     | Product List<br><i>Searchable list of products and release dates</i>                     | Customer Segment Analysis<br><i>Comparative analysis of customer segment by product, agreement type etc</i> | Agreement Modelling<br><i>Tools for capturing customer deployment plans and modelling best agreement options</i> |
| Customer Profile<br><i>Customer profile from MS Sales trans</i>                    | Reseller Analysis<br><i>In-depth analysis of this reseller</i>     | Product Profile<br><i>Analysis of sales for each product or product family</i>           | Agreement Analysis<br><i>Comparative analysis of agreement type by product, segment, reseller etc</i>       | Call Center Workbench<br><i>Scripts for capturing and overlaying information via call center programs</i>        |
| Compliance Summary<br><i>Estimate of compliance position</i>                       | Reseller Reports<br><i>Various reports on reseller activity</i>    | Product Reports<br><i>Various reports on product transactions</i>                        | Product Analysis<br><i>Comparative analysis of product families by customer segment, agreement type etc</i> | Reseller Access<br><i>Ability for Resellers to access data and views for assigned customers</i>                  |
| Transaction List<br><i>Searchable list of all MS Sales trans</i>                   | Reseller Administration<br><i>Linking and other reseller admin</i> | Product Licensing Rules<br><i>Summary of licensing rules for a chosen product family</i> |   | Customer Access<br><i>Ability for customers to review MS Sales transaction analysis</i>                          |
| Agreement List<br><i>Searchable list of all VLM agreements</i>                     |  |  |   |  |
| Record Other Licensing<br><i>Ability to record other licensing (e.g. FPP, OEM)</i> |  |  |   |  |
| Review Other Licensing<br><i>Review and edit other licensing entries</i>           |  |  |   |  |
| Record Installation Data<br><i>Ability to record installation information</i>      |  |  |   |  |
| ELP Workbench<br><i>Modify an Effective Licensing Position</i>                     |  |  |   |  |
| Review History<br><i>Review previous compliance activity</i>                       |  |  |   |  |
| Report on Customers<br><i>Report various customer reports</i>                      |  |  |   |  |
| Customer Administration<br><i>Linking and other customer admin</i>                 |  |  |   |  |

Quick Menu: Overview, Customer Profile, Compliance Summary, Transaction List, Agreement List, Record Other Licensing, Review Other Licensing, Record Installation Data, ELP Workbench, Review History, Report on Customers, Customer Administration

Start | Internet | 3:40 p.m.

Figure 2



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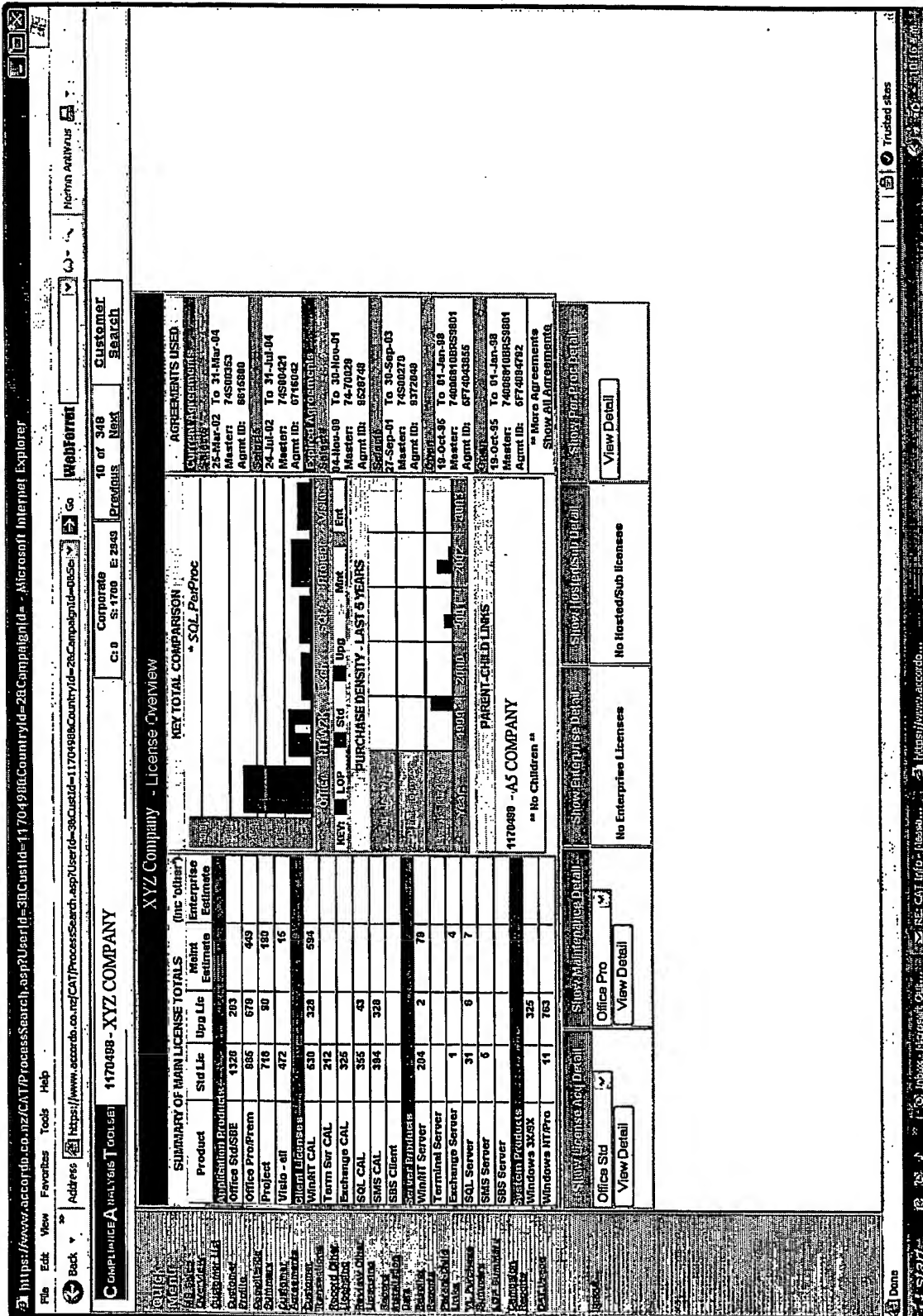


Figure 3A

http://www.accordo.co.nz/CAT\_Test/CAT.asp - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back

Forward

Stop

Home

Search

History

Address http://www.accordo.co.nz/CAT\_Test/CAT.asp

COMPLIANCE ANALYSIS TOOLSET

1112117 XYZ COMPANY

Upper Mid-Market

1 of 104

Choose Customer

Object Menu

Home

MS Sales Overview

Customer Profile

Compliance Summary

Customer Agreements

Customer Transactions

Record Other Licenses

Review Other Licenses

Product Installation Data

Rebates Profile

Customer Summary Report

1112117 - XYZ Company

LICENSE OWNERSHIP AND COMPLIANCE SUMMARY

| Product                            | Version | Std Lic | Upd Lic | Maint Accr's | Ent Accr's | Total MS Sales | Other Lic | Total Owned | Total Inst'd | Compl Status | Compliance Display | Est Cost |
|------------------------------------|---------|---------|---------|--------------|------------|----------------|-----------|-------------|--------------|--------------|--------------------|----------|
| Office ProBookshelf Bundle         | 97      |         |         |              |            | 50             |           | 50          | 20           | 30           |                    | \$9,500  |
| Office Professional                | 7.00    |         | 100     |              |            | 100            |           | 100         | 110          | -10          |                    | \$0      |
| Office Small Business              | 2000    | 4       |         |              |            | 4              | 5         | 9           | 10           | -1           |                    | \$0      |
| PowerPoint                         | 2000    | 4       |         |              |            | 4              |           | 4           |              | 4            |                    | \$12,924 |
| Project                            | 2000    | 16      |         |              |            | 16             |           | 16          | 34           | -18          |                    |          |
| Publisher                          | 2000    | 10      |         |              |            | 10             |           | 10          | 10           | 0            |                    |          |
| SQL Server Standard Edition        | 2000    | 1       |         |              |            | 1              |           | 1           | 1            | 0            |                    |          |
| Visio Enterprise                   | 2000    |         |         |              |            |                | 2         | 2           | 2            | 2            |                    |          |
| Visio Professional                 | 2000    | 13      |         |              |            | 13             |           | 13          | 22           | -9           |                    | \$7,576  |
| Visio Professional                 | 2002    | 3       |         |              |            | 3              |           | 3           | 6            | -3           |                    | \$2,626  |
| Visio Standard                     | 2002    | 11      |         |              |            | 11             |           | 11          | 9            | 2            |                    |          |
| Visual FoxPro Professional         | 6.00    | 1       |         |              |            | 1              |           | 1           | 1            | 0            |                    |          |
| Windows 2000 CAL                   | 2000    | 5       |         |              |            | 5              | 10        | 15          | 44           | -29          |                    | \$1,798  |
| Windows 2000 Professional          | 2000    |         |         |              |            |                | 95        | 95          | 142          | -47          |                    | \$16,263 |
| Windows 2000 Server                | 2000    | 5       |         |              |            | 5              |           | 5           | 5            | 0            |                    |          |
| Windows 2000 Terminal Services CAL | 2000    | 5       |         |              |            | 5              |           | 5           | 5            | 0            |                    |          |
| Windows 95                         | 95      |         |         |              |            |                |           |             |              |              |                    |          |
| Windows NT CAL                     |         | 150     | 100     |              |            | 100            |           | 100         | 100          | 100          |                    |          |
| Windows XP Professional            | XP      |         | 2       |              |            | 2              |           | 2           | 2            | 2            |                    | \$52,609 |
| Estimated Non-Compliance Cost      |         |         |         |              |            |                |           |             |              |              |                    |          |

Done

Start

Internet

3:43 p.m.

Figure 4

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|  |         |                |           |                 |             |                 |           |           |            |
|--|---------|----------------|-----------|-----------------|-------------|-----------------|-----------|-----------|------------|
| http://accpower/CAT_DEV/CAT.asp - Microsoft Internet Explorer  |         |                |           |                 |             |                 |           |           |            |
| File   | Edit    | View           | Favorites | Tools           | Help        | Back            | Forward   | Search    | Media      |
| Address http://accpower/CAT_DEV/CAT.asp  |         |                |           |                 |             |                 |           |           |            |
| <div> <div> <div>5671830 - XYZ COMPANY</div> <div>5671830 - XYZ COMPANY</div> </div> <div> <div>Small Business</div> <div>6 of 23</div> <div>Chosea Customer</div> </div> </div> |         |                |           |                 |             |                 |           |           |            |
| COMPLIANCE SUMMARY   |         |                |           |                 |             |                 |           |           |            |
| Product  | Version | Total MS Sales | Total OEM | Total PFP/Other | Total Owned | Total Installed | Value Raw | Value Adj | Downgrades |
| Exchange CAL   | 2000    | 0              | 0         | 0               | 0           | 0               | 0         | 0         | 0          |
| Summary Total for Exchange CAL   |         |                |           |                 |             |                 |           |           |            |
| Exchange Server - Standard   | 2000    | 0              | 0         | 0               | 0           | 0               | 0         | 0         | 0          |
| Summary Total for Exchange Server - Standard   |         |                |           |                 |             |                 |           |           |            |
| Office   | 2000    | 0              | 0         | 0               | 0           | 0               | 0         | 0         | 0          |
| Summary Total for Office   |         |                |           |                 |             |                 |           |           |            |
| Project  | 2002    | 0              | 0         | 0               | 0           | 0               | 0         | 0         | 0          |
| Summary Total for Project  |         |                |           |                 |             |                 |           |           |            |
| SQL Server Standard Edition  | 2000    | 0              | 0         | 0               | 0           | 0               | 0         | 0         | 0          |
| Summary Total for SQL Server Standard Edition  |         |                |           |                 |             |                 |           |           |            |
| Windows NT CAL   | 2000    | 25             | 0         | 0               | 0           | 0               | 0         | 0         | 0          |
| Windows NT CAL   | 2003    | 0              | 0         | 0               | 0           | 0               | 0         | 0         | 0          |
| Summary Total for Windows NT CAL   |         |                |           |                 |             |                 |           |           |            |
| Windows NT Server  | 2000    | 1              | 0         | 0               | 0           | 0               | 0         | 0         | 0          |
| Summary Total for Windows NT Server  |         |                |           |                 |             |                 |           |           |            |
| Office Small Business  | 2000    | 0              | 0         | 0               | 0           | 0               | 0         | 0         | 0          |
| Summary Total for Office Small Business  |         |                |           |                 |             |                 |           |           |            |

Figure 4A

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|   |         |         |         |          |           |           |           |           |           |
|---|---------|---------|---------|----------|-----------|-----------|-----------|-----------|-----------|
| http://accpower/CAT_DEV/CAT.asp - Microsoft Internet Explorer |         |         |         |          |           |           |           |           |           |
| File Edit View Favorites Tools Help                           |         |         |         |          |           |           |           |           |           |
| Back - Search Favorites Media                                 |         |         |         |          |           |           |           |           |           |
| Address http://accpower/CAT_DEV/CAT.asp                       |         |         |         |          |           |           |           |           |           |
| COMPLIANCE ANALYSIS TOOLSET                                   |         |         |         |          |           |           |           |           |           |
| 2253186 - XYZ Company LOP PRODUCT OWNERSHIP SUMMARY           |         |         |         |          |           |           |           |           |           |
| LOP Calculated on 18-Apr-03                                   |         |         |         |          |           |           |           |           |           |
| Product   | Version | Std Lic | Upg Lic | Asst Lic | Ent Act's | Ent Act's | Ent Act's | Ent Act's | Ent Act's |
| Exchange CAL  | 2000    |         |         | 340      |           |           |           |           |           |
| Exchange Server - Enterprise                                  | 2000    | 1       |         | 1        |           |           |           |           |           |
| Exchange Server - Standard                                    | 2000    |         |         | 2        |           |           |           |           |           |
| FrontPage   | 2000    | 5       |         |          |           |           |           |           |           |
| Office  | 2000    | 80      | 40      |          |           |           |           |           |           |
| Office Developer  | 2000    | 26      |         | 5        |           |           |           |           |           |
| Office Professional   | 2000    |         |         |          |           |           |           |           |           |
| Project   | 2000    | 2       |         | 40       |           |           |           |           |           |
| Publisher   | 2002    | 5       |         | 10       |           |           |           |           |           |
| SQL CAL   | 7.00    | 5       |         |          |           |           |           |           |           |
| SOL Server Standard Edition                                   | 2000    | 8       |         | 3        |           |           |           |           |           |
| Visual Basic Enterprise                                       | 6.00    | 1       |         |          |           |           |           |           |           |
| Visual SourceSafe   | 6.00    | 23      | 1       |          |           |           |           |           |           |
| Visual studio .NET Ent Developer                              | 6.00    | 1       |         |          |           |           |           |           |           |
| Visual Studio .NET Professional                               | 6.00    | 2       |         |          |           |           |           |           |           |
| 2253186 - XYZ Company LOP PRODUCT OWNERSHIP SUMMARY           |         |         |         |          |           |           |           |           |           |
| LOP Calculated on 18-Apr-03                                   |         |         |         |          |           |           |           |           |           |
| Product   | Version | Std Lic | Upg Lic | Asst Lic | Ent Act's | Ent Act's | Ent Act's | Ent Act's | Ent Act's |
| Exchange CAL  | 2000    |         |         | 340      |           |           |           |           |           |
| Exchange Server - Enterprise                                  | 2000    | 1       |         | 1        |           |           |           |           |           |
| Exchange Server - Standard                                    | 2000    |         |         | 2        |           |           |           |           |           |
| FrontPage   | 2000    | 5       |         |          |           |           |           |           |           |
| Office  | 2000    | 80      | 40      |          |           |           |           |           |           |
| Office Developer  | 2000    | 26      |         | 5        |           |           |           |           |           |
| Office Professional   | 2000    |         |         |          |           |           |           |           |           |
| Project   | 2000    | 2       |         | 40       |           |           |           |           |           |
| Publisher   | 2002    | 5       |         | 10       |           |           |           |           |           |
| SQL CAL   | 7.00    | 5       |         |          |           |           |           |           |           |
| SOL Server Standard Edition                                   | 2000    | 8       |         | 3        |           |           |           |           |           |
| Visual Basic Enterprise                                       | 6.00    | 1       |         |          |           |           |           |           |           |
| Visual SourceSafe   | 6.00    | 23      | 1       |          |           |           |           |           |           |
| Visual studio .NET Ent Developer                              | 6.00    | 1       |         |          |           |           |           |           |           |
| Visual Studio .NET Professional                               | 6.00    | 2       |         |          |           |           |           |           |           |

Figure 4B



[illegible]



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10/532757

http://www.accordo.co.nz/CAT\_Test/CAT.asp - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://www.accordo.co.nz/CAT\_Test/CAT.asp

Search Favorites History

Go Links

**COMPLIANCE ANALYSIS TOOLSET** 1112117 - XYZ COMPANY

Upper Mid-Market 1 of 104 Next

Choose Customer

Hide Detail

Show Trans reset

Customer Master Agreement

Reseller Transaction Type Agreement ID

Date From Date To

Product

All Transaction Data

| Part Desc   | Part#                  | Level                | Seg                          | Version Upgrade | Non-specific    | Upgrade Advantage | 50        | 31-Jul-98 | Open |
|---|------------------------|----------------------|------------------------------|-----------------|-----------------|-------------------|-----------|-----------|------|
| 1112117 Office ProBookshelf Bundle                      | 363-00062              | New Open Maintenance | Upper Mid-Market             | 7.00            | Version Upgrade | 100               | 31-Jan-97 | Open      |      |
| Part Desc: Office ProBookshelf Win32 English UpgAdv OLP | Part#: 11006776AAS0007 | Level: 9111049597    | Term: 28-Jul-98 to 31-Jul-00 |                 |                 |                   |           |           |      |
| Address: 250 Archers Road, Takepuna, AUCKLAND           |                        |                      |                              |                 |                 |                   |           |           |      |
| Reseller: Financial Systems Limited                     |                        |                      |                              |                 |                 |                   |           |           |      |
| 1112117 Office Professional                             | 269A060-70LPB          | Open Upg             | Upper Mid-Market             | 2000            | Standard        | 4                 | 25-May-01 | Open      |      |
| Part Desc: Office Pro 7.0 Win32 English VUP OLP B       | Part#: 688-01288       | Level: Open Std      | Term: 08-May-01 to 30-Nov-02 |                 |                 |                   |           |           |      |
| Address: 250 Archers Road, Takepuna, AUCKLAND           |                        |                      |                              |                 |                 |                   |           |           |      |
| Reseller: Financial Systems Limited                     |                        |                      |                              |                 |                 |                   |           |           |      |
| 1112117 Office Small Business                           | 079-01180              | Open Std             | Upper Mid-Market             | 2000            | Standard        | 4                 | 25-May-01 | Open      |      |
| Part Desc: Office SB 2000 Win32 English OLP HL          | Part#: 12931395ZZS0211 | Level: 9113681083    | Term: 08-May-01 to 30-Nov-02 |                 |                 |                   |           |           |      |
| Address: 250 Archers Road, Takepuna, AUCKLAND           |                        |                      |                              |                 |                 |                   |           |           |      |
| Reseller: Financial Systems Limited                     |                        |                      |                              |                 |                 |                   |           |           |      |
| 1112117 PowerPoint                                      | 076-01257              | Open Std             | Upper Mid-Market             | 2000            | Standard        | 15                | 26-May-00 | Open      |      |
| Part Desc: PowerPoint 2000 Win32 English OLP HL         | Part#: 12448666ZZS0205 | Level: 9112482051    | Term: 26-May-00 to 31-May-02 |                 |                 |                   |           |           |      |
| Address: 250 Archers Road, Takepuna, AUCKLAND           |                        |                      |                              |                 |                 |                   |           |           |      |
| Reseller: Financial Systems Limited                     |                        |                      |                              |                 |                 |                   |           |           |      |
| 1112117 Project   | 076-01257              | Open Std             | Upper Mid-Market             | 2000            | Standard        | 1                 | 25-Jan-02 | Open      |      |
| Part Desc: Project 2000 Win32 English OLP HL            | Part#: 12931395ZZS0211 | Level: 9113681083    | Term: 08-May-01 to 30-Nov-02 |                 |                 |                   |           |           |      |
| Address: 250 Archers Road, Takepuna, AUCKLAND           |                        |                      |                              |                 |                 |                   |           |           |      |
| Reseller: Financial Systems Limited                     |                        |                      |                              |                 |                 |                   |           |           |      |
| 1112117 Project   | 076-01257              | Open Std             | Upper Mid-Market             | 2000            | Standard        | 1                 | 25-Jan-02 | Open      |      |
| Part Desc: Project 2000 Win32 English OLP HL            | Part#: 12931395ZZS0211 | Level: 9113681083    | Term: 08-May-01 to 30-Nov-02 |                 |                 |                   |           |           |      |
| Address: 250 Archers Road, Takepuna, AUCKLAND           |                        |                      |                              |                 |                 |                   |           |           |      |
| Reseller: Financial Systems Limited                     |                        |                      |                              |                 |                 |                   |           |           |      |

Done

Start

Internet 3:43 P.M.

Figure 5

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http://www.accordo.co.nz/CAT\_Test/CAT.asp - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://www.accordo.co.nz/CAT\_Test/CAT.asp

Back Forward Stop Reload Home Search Favorites History

COMPLIANCE ANALYSIS TOOLSET 1112117 - XYZ COMPANY

Upper Mid-Market 1 of 104 Next

Choose Customer

Hide Detail

Listing Of All Agreements Used

Customer Agreement Status Program Master Agreement show agmts

Reseller Start Date from End Date to Agreement ID reset

| Customer                         | Master                  | Agmt ID             | Agmt ID             | Start            |
|----------------------------------|-------------------------|---------------------|---------------------|------------------|
| OPEN LICENSE - Expired           | Master: 83011025BAS9904 | Agmt ID: 5F83013789 | Agmt ID: 5F83013789 | Start: 30-Jan-97 |
| OPEN LICENSE - Expired           | Master: 83011049BSS9904 | Agmt ID: 5F83013812 | Agmt ID: 5F83013812 | Start: 30-Jan-97 |
| OPEN LICENSE - Expired           | Master: 11006766AKS0007 | Agmt ID: 9111019594 | Agmt ID: 9111019594 | Start: 29-Jul-98 |
| OPEN LICENSE - Expired           | Master: 11006776AAS0007 | Agmt ID: 9111019597 | Agmt ID: 9111019597 | Start: 29-Jul-98 |
| OPEN LICENSE - Expired           | Master: 83011025BAS9904 | Agmt ID: 9111368009 | Agmt ID: 9111368009 | Start: 02-May-99 |
| OPEN LICENSE - Expired           | Master: 12448566ZZS0205 | Agmt ID: 9112482051 | Agmt ID: 9112482051 | Start: 25-May-00 |
| OPEN LICENSE - Current           | Master: 12931395ZZS0211 | Agmt ID: 9112968780 | Agmt ID: 9112968780 | Start: 03-Nov-00 |
| OPEN LICENSE - Current           | Master: 12931395ZZS0211 | Agmt ID: 9113023246 | Agmt ID: 9113023246 | Start: 20-Nov-00 |
| OPEN LICENSE - Current           | Master: 12931395ZZS0211 | Agmt ID: 9113101492 | Agmt ID: 9113101492 | Start: 10-Dec-00 |
| OPEN LICENSE - Current           | Master: 12931395ZZS0211 | Agmt ID: 9113233332 | Agmt ID: 9113233332 | Start: 18-Jan-01 |
| OPEN LICENSE - Current           | Master: 12931395ZZS0211 | Agmt ID: 9113239128 | Agmt ID: 9113239128 | Start: 21-Jan-01 |
| OPEN LICENSE - Current           | Master: 12931395ZZS0211 | Agmt ID: 9113466688 | Agmt ID: 9113466688 | Start: 18-Mar-01 |
| OPEN LICENSE - Current           | Master: 12931395ZZS0211 | Agmt ID: 9113486304 | Agmt ID: 9113486304 | Start: 21-Mar-01 |
| OPEN LICENSE - Current           | Master: 12931395ZZS0211 | Agmt ID: 9113602771 | Agmt ID: 9113602771 | Start: 17-Apr-01 |
| OPEN LICENSE - Current           | Master: 12931395ZZS0211 | Agmt ID: 9113681083 | Agmt ID: 9113681083 | Start: 08-May-01 |
| OPEN LICENSE - Current (4900110) | Master: 12931395ZZS0211 | Agmt ID: 9113954549 | Agmt ID: 9113954549 | Start: 17-Jul-01 |
| OPEN LICENSE - Current           | Master: 12931395ZZS0211 | Agmt ID: 9114248162 | Agmt ID: 9114248162 | Start: 07-Oct-01 |

Quick Menu

MS Access Overview

Customer Profile

Compliance Summary

Customer Agreement

Customer Transactions

Reseller Agreement

Review Other Agreements

Reseller Profiles

Customer Summary Report

Start Stop Print A... D... I... C... O... M... N... I... Internet 3:44 p.m.

Figure 6

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http://www.accordco.co.nz/CAT\_Test/CAT.asp - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Search Favorites History

Address http://www.accordco.co.nz/CAT\_Test/CAT.asp

**COMPLIANCE ANALYSIS TOOLSET** 1112117 - XYZ COMPANY

Upper Mid-Market 1 of 104 Choose Customer

**FINAL STEP**

**SELECT VERSION AND RECORD DETAILS**

1. Enter your name without this nothing will be recorded

Your name (e.g. John Smith)

2. Choose Version

Record quantity applied and Date of Acquisition

Enter quantity  and date

3. Select License Type

☒ Standard License ☐ Version Upg ☐ Competitive Upg ☐ Product Upg  
☐ Maintenance (incl UA or SA) - also need End Date...

4. Select Method of License Acquisition

☒ Full Package Product (PPP) ☐ OEM  
☐ License Transfer ☐ Gifted (add explanation below)  
☐ Technology Guarantee ☐ Other (add explanation below)

5. Proof of Purchase Confirmation

☒ Confirmation not sighted ☐ Proof of Purchase confirmed  
☐ Add explanation below

RECORD DATA RESET FORM

**STEP 2 OF 3**

**REFINE SELECTION**

Office Variations

☒ Office  
☐ Office Mac  
☐ Office Small Business  
☐ Office Professional  
☐ Office Premium  
☐ Office Pro Special Edition  
☐ Office Pro/Bookshelf  
☐ Office Pro/Bookshelf/WFoxPro  
☐ Office Pro/WFoxPro  
☐ Office Developer

NEXT ->

**STEP 1 OF 3**

**SELECT PRODUCT TYPE**

Applications

☒ Office  
☐ Project  
☐ Visio  
☐ Languages  
☐ Single Applications

Server

☐ NT/Windows  
☐ Exchange  
☐ SQL  
☐ SMS  
☐ BackOffice  
☐ Terminal Server  
☐ Small Business Server  
☐ Other Server

Systems

☐ Windows  
☐ Other Systems

NEXT ->

Menu Site Map Mkt Sales Overview Customer Profile Compliance Summary Customer Arrangements Customer Transactions Record Other Licenses Review Other Licenses Record Installation Data Reseller Profiles Customer Summary Report

Done Start

Internet 3:45 p.m.

Figure 7

2) [http://www.accordo.com/nz/CAT\\_Test/CAT.asp](http://www.accordo.com/nz/CAT_Test/CAT.asp) - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search History

Address [http://www.accordo.com/nz/CAT\\_Test/CAT.asp](http://www.accordo.com/nz/CAT_Test/CAT.asp)

**COMPLIANCE ANALYSIS TOOL SET**    **1112117 - XYZ COMPANY**    **Upper Mid-Market**    **1 of 104**    **Choose Customer**

**1112117 - XYZ Company**    - All Licenses Acquired by Other Means

| Customer | Product   | Method  | Proof of Purchase | Apply Filter |
|----------|-----------|---------|-------------------|--------------|
| enterer  | Date From | Date To | License Type      | reset        |

| 1112117  | Visto Enterprise  | 2000 | Standard License      | 2      | 01-Jan-02 | Full Package (FPP) |
|----------|-------------------|------|-----------------------|--------|-----------|--------------------|
| Enterer: | WJ (on 23-Oct-02) |      | Status: Not Confirmed | Notes: |           |                    |
| 1112117  | Windows 2000 CAL  | 2000 | Standard License      | 10     | 01-Jan-02 | Full Package (FPP) |
| Enterer: | WJ (on 23-Oct-02) |      | Status: Not Confirmed | Notes: |           |                    |

MS Sales Overview

Customer Profile

Compliance Summary

Customer Transactions

Record Change

Review Other

License

Install

Installation Data

Reseller Profiles

Customer Summary Report

Done Start

Internet

3:45 p.m.

**Figure 8**



Internet Explorer - http://www.accordio.co.nz/CAT\_Test/CAT.asp - Microsoft Internet Explorer

Address: http://www.accordio.co.nz/CAT\_Test/CAT.asp

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites History

COMPLIANCE ANALYSIS TOOLSET 1112117 - XYZ COMPANY

Upper Mid-Market 1 of 104 Choose Customer

Next

**STEP 1 OF 3**

**SELECT PRODUCT TYPE**

**Applications**

☐ Office

☐ Project

☐ Visio

☐ Languages

☐ Single Applications

**System**

☐ NT/Windows

☐ Exchange

☐ SQL

☐ SMS

☐ BackOffice

☐ Terminal Server

☐ Small Business Server

☐ Other Server

**System**

☐ Windows

☐ Other Systems

NEXT →

**STEP 2 OF 3**

**REFINE SELECTION**

**Office Applications**

☐ Office

☐ Office Mac

☐ Office Small Business

☐ Office Professional

☐ Office Premium

☐ Office Pro Special Edition

☐ Office Pro/Bookshelf

☐ Office Pro/Bookshelf/MFoxPro

☐ Office Pro/MFoxPro

☐ Office Developer

NEXT →

**FINAL STEP**

**EDIT INSTALLATION QUANTITIES**

The table shows the selected products and the current recorded installation quantity for each. This quantity can be updated by amending the appropriate entry and pressing the 'UPDATE QUANTITY' button.

Choose Product Version

UPDATE QUANTITY

RESET FORM

Done Start

Internet 3:45 p.m.

Figure 9

14/32

http://www.accordo.co.nz/CAT\_Test/CAT.asp - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search History Favorites

Address http://www.accordo.co.nz/CAT\_Test/CAT.asp

Go Links

**COMPLIANCE ANALYSIS TOOLSET**

**Reseller View**

**List of Resellers**

Group Alphabetically Agreement Type Customer Type Active From Search for

Show All Show All Show All Jul-96 display reset

Show Children

| 12  | A1 COMPANY  | First Txn<br>23-Dec-00 | Last Txn<br>02-Aug-02 | Customer Types<br>CMM                  | Total Cusis: | 1   | Total Agmts: | 17   | Product Pools<br>Apps Surs     | View Profile |
|-----|-------------|------------------------|-----------------------|--|--------------|-----|--------------|------|--------------------------------|--------------|
| 65  | A2 COMPANY  | First Txn<br>30-Jun-00 | Last Txn<br>23-Aug-02 | Customer Types<br>CMM                  | Total Cusis: | 15  | Total Agmts: | 25   | Product Pools<br>Apps Surs Sys | View Profile |
| 113 | A3 COMPANY  | First Txn<br>28-Sep-01 | Last Txn<br>28-Sep-01 | Customer Types<br>Smb                  | Total Cusis: | 1   | Total Agmts: | 1    | Product Pools<br>Surs Sys      | View Profile |
| 119 | A4 COMPANY  | First Txn<br>27-Aug-99 | Last Txn<br>27-Aug-99 | Customer Types<br>CMM UMM              | Total Cusis: | 2   | Total Agmts: | 2    | Product Pools<br>Apps Surs     | View Profile |
| 143 | A5 COMPANY  | First Txn<br>01-Jan-99 | Last Txn<br>01-Jan-99 | Customer Types                         | Total Cusis: | 1   | Total Agmts: | 1    | Product Pools<br>Surs          | View Profile |
| 173 | A6 COMPANY  | First Txn<br>02-Aug-96 | Last Txn<br>23-Aug-02 | Customer Types<br>Smb CMM UMM Corp     | Total Cusis: | 92  | Total Agmts: | 246  | Product Pools<br>Apps Surs Sys | View Profile |
| 202 | A7 COMPANY  | First Txn<br>02-Aug-96 | Last Txn<br>23-Aug-02 | Customer Types<br>Smb CMM UMM Corp Maj | Total Cusis: | 202 | Total Agmts: | 1058 | Product Pools<br>Apps Surs Sys | View Profile |
| 247 | A8 COMPANY  | First Txn<br>30-Mar-01 | Last Txn<br>25-Jan-02 | Customer Types<br>CMM                  | Total Cusis: | 2   | Total Agmts: | 4    | Product Pools<br>Surs          | View Profile |
| 292 | A9 COMPANY  | First Txn<br>02-Aug-96 | Last Txn<br>16-Aug-02 | Customer Types<br>Smb CMM UMM Corp     | Total Cusis: | 48  | Total Agmts: | 91   | Product Pools<br>Apps Surs Sys | View Profile |
| 296 | A10 COMPANY | First Txn<br>01-Jan-99 | Last Txn<br>26-Apr-02 | Customer Types<br>Smb CMM UMM Corp     | Total Cusis: | 12  | Total Agmts: | 24   | Product Pools<br>Apps Surs Sys | View Profile |

Start Stop Print Refresh Back Forward Stop Search History Favorites

Done

Internet 3:46 p.m.

Figure 10

**Figure 11**



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Microsoft Access - [Customer Profiling] File Edit View Insert Format Records Tools Window Help

Type a question for help

Record: 14 of 2 (filtered)

Form View

SQL Apps and Intranet

Does your org use an Intranet? ☒

If yes, what proportion of users have regular access?

If yes, is anything available via Intranet which uses SQL Server (e.g. phone list)?

Is there any other app, e.g. financial/HR package, which uses SQL? ☒

If yes, please list:

And estimate the number of users accessing SQL in this way

Do you know how the SQL use in these apps is licensed?

Use of Terminal Server

Do any users connect via Terminal Sur (thin clients)?

If yes, approximately how many users connect in this way?

License Analysis Next Page

General Product Use

For each product, indicate the level of use...

Office Std  Office Pro

Project  Visio

Access  Outlook

Network Infrastructure

What do you use as a network infrastructure?

If NT/Win2000 is not used for file/print etc, is it used as an application server? ☒

If yes, how many users access such NT/Win2000 hosted applications?

Of these, how many would access Windows 2000 Server?

Exchange and Outlook

Is Outlook the primary mail client? ☒

Is Exchange the email medium? ☒

Other Purchases

End User Device Profile

Total devices?

Made up of.....

Desktop PCs  Distributed across

Notebook PCs

Thin Client Devices  sites.

Add any comment on number of seats...

Use of Standard Products

Do you have a std desktop config?

Which typically go on each device?

Office (any type) ☒ NT/Win2K CAL ☒

Exchange ☒ Outlook ☒

SMS ☒ SNA (Host Intn) ☒

Access ☒ SQL CAL ☒

If there is a std config, how is it deployed?

Growth Forecast

How do you expect user numbers to change over the next 1-2 years?

If you expect a change, by what percentage?

Preferred Purchasing Method

If licenses need to be purchased, what is the preferred method?

Preferred Reseller  Account Manager

Windows Desktop O/S

Which desktop o/s is standard?

Do you ever buy PCs without Windows bundled? ☒

If yes, where

Figure 12

17/32

Microsoft Access - [Customer Profiling]    Type a question for help

File Edit View Insert Format Records Tools Window Help

**SMS**    ☒ SHA (Host Intn)    ☒ SQL CAL    ☒ Access

If there is a std config, how is it deployed?   

**Exchange and Outlook**

Is Outlook the primary mail client?    ☒   

Is Exchange the email medium?    ☒   

**Other Purchases**

**License Analysis**     Next Page   

**Do any users connect via Terminal**   

**Sur (thin client)?**   

**If yes, approximately how many users connected in this way?**     0

**Preferred Purchasing Method**

If licenses need to be purchased, what is the preferred method?   

Preferred Reseller     Account Manager   

**Summary Notes**

Detail any impending licensing expected   

\$-Value of Impendings     \$0.00

Any final notes (for MS consumption)   

**Growth Forecast**

How do you expect user numbers to change over the next 1-2 years?   

If you expect a change, by what percentage?   

**Future Projects**

Do you expect to undertake projects in the next 1-2 years which will impact on MS product usage?   

**Windows Desktop O/S**

Which desktop o/s is standard?   

Do you ever buy PCs without Windows bundled?    ☒

If yes, where from?   

**License Transcript**

Discuss the License Transcript already received, and note any relevant comments   

**Other Purchases**

**Post-call analysis required?**    ☒

**Back to Top**   

**License Analysis**   

Record: 1 2 of 2 (Filtered)    Form View

Microsoft Access - [Customer Profiling]    F.L.R.    NJM

Figure 13

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## Parent-child linking

The screenshot shows a web browser window displaying a web application. The address bar shows the URL: [http://www.accordo.co.nz/Project\\_MS/CAT.asp](http://www.accordo.co.nz/Project_MS/CAT.asp). The browser's status bar at the bottom indicates the page is from <http://www...> and is served by <http://www...>.

The application interface includes a top navigation bar with the following elements:

- File Edit View Favorites Tools Help
- Address [http://www.accordo.co.nz/Project\\_MS/CAT.asp](http://www.accordo.co.nz/Project_MS/CAT.asp)
- COMPLIANCE ANALYSIS TOOLSET
- 4252468 - XYZ COMPANY
- Small Business
- 1 of 8688
- Next
- Choose Customer

The main content area is titled "Customer Linking Main Menu" and contains three sections:

- 1. View all existing customer links**  
You can enter a character string in the search box to narrow down the list. The list will contain all links where the parent or child name contains the search string (this search is case-sensitive).  
Search String:   
View Links
- 2. Register a new customer link**  
This will take you to a page where you can select parent and child customers to form a new customer link. The link will not be activated until checked by an administrator - typically within 24 hours.  
Register a Link
- 3. Register a link removal**  
This will take you to a page where you can select an existing link and request its removal. The link removal will not be activated until checked by an administrator - typically within 24 hours. You can enter a character string in the search box to narrow down the list. The list will contain all links where the parent or child name contains the search string (this search is case-sensitive).  
Search String:   
Remove a Link

The bottom of the page features a "Quick Menu" with the following links:

- Home
- Site Map
- My Links
- Overview
- Customers
- Profile
- Summary
- Business
- Screening
- Customer
- Transaction
- Referred Other
- Unassigned
- Review Other
- License
- Record
- Installation
- Data
- Reseller
- Profiles
- Link
- Customer
- Summary
- Report

Figure 14

| COMPLIANCE ANALYSIS TOOLSET |  | 4282468 - 121 XYZ COMPANY |  | 1 of 8688<br>Next |  | Choose Customer |  |
|-----------------------------|--|---------------------------|--|-------------------|--|-----------------|--|
| Small Business              |  | Active                    |  | W Jackson         |  | 04-Nov-02       |  |
| 4742575 - A2 Company        |  | Active                    |  | W Jackson         |  | 04-Nov-02       |  |
| 4750153 - A3 Company        |  | Active                    |  | W Jackson         |  | 04-Nov-02       |  |
| 1620624 - A3A Company       |  | Active                    |  | W Jackson         |  | 04-Nov-02       |  |
| 4619889 - A3B Company       |  | Active                    |  | W Jackson         |  | 04-Nov-02       |  |
| 5291412 - A3C Company       |  | Active                    |  | W Jackson         |  | 04-Nov-02       |  |
| 4757500 - A4 Company        |  | Active                    |  | W Jackson         |  | 04-Nov-02       |  |
| 4187146 - A4A Company       |  | Active                    |  | W Jackson         |  | 04-Nov-02       |  |
| 5070008 - A4B Company       |  | Active                    |  | W Jackson         |  | 04-Nov-02       |  |
| 4772010 - A5 Company        |  | Active                    |  | W Jackson         |  | 04-Nov-02       |  |
| 4789954 - A5A Company       |  | Active                    |  | W Jackson         |  | 04-Nov-02       |  |
| 4782947 - A6 Company        |  | Active                    |  | W Jackson         |  | 04-Nov-02       |  |
| 2185912 - A6A Company       |  | Active                    |  | W Jackson         |  | 04-Nov-02       |  |
| 4810729 - A7 Company        |  | Active                    |  | W Jackson         |  | 04-Nov-02       |  |
| 4938207 - A7A Company       |  | Active                    |  | W Jackson         |  | 04-Nov-02       |  |
| 4840948 - A8 Company        |  | Active                    |  | W Jackson         |  | 04-Nov-02       |  |
| 4945619 - A8A Company       |  | Active                    |  | W Jackson         |  | 04-Nov-02       |  |
| 4841035 - A9 Company        |  | Active                    |  | W Jackson         |  | 04-Nov-02       |  |
| 4146240 - A9A Company       |  | Active                    |  | W Jackson         |  | 04-Nov-02       |  |
| 4488636 - A9B Company       |  | Active                    |  | W Jackson         |  | 04-Nov-02       |  |
| 4242781 - A9C Company       |  | Active                    |  | W Jackson         |  | 04-Nov-02       |  |
| 4848014 A10 Company         |  | Active                    |  | W Jackson         |  | 04-Nov-02       |  |
| 2917462 - A10A Company      |  | Active                    |  | W Jackson         |  | 04-Nov-02       |  |

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http://www.accordb.co.nz/Project\_MS/CAT.asp - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Address http://www.accordb.co.nz/Project\_MS/CAT.asp Go WebFarret Choose Customer

Small Business 1 of 8688 Next

### Register a Proposed Customer Link

This screen is divided into two sections. In the left panel you can choose a parent customer, and in the right panel choose a child customer. For each choice, you can use the search tools provided to quickly identify the appropriate customer.

#### Search for a Parent

Enter a search string in the panel provided to narrow the choice of parent customer. Then choose a parent from the drop-down list at the bottom of the page.

Enter Search String:

Now choose a search mode:

☒ Starts With ☐ Contains ☐ From Here ☐ Show All ☐ With ID

#### Choose a Parent

Note: Current link status is shown, e.g. 'Not Lkd' means this customer is not currently linked, 'Lkd Pnt' means linked as a parent, 'Lkd Chd' means linked as a child, and 'Lkd P&C' means this customer is a child and also a parent

Not Lkd 5620913 - XYZ Company

#### Search for a Child

Enter a search string in the panel provided to narrow the choice of child customer. Then choose a child from the drop-down list at the bottom of the page.

Enter Search String:

Now choose a search mode:

☒ Starts With ☐ Contains ☐ From Here ☐ Show All ☐ With ID

#### Choose a Child

Note: Current link status is shown as with 'Choose a Parent'

Not Lkd 4252468 - XYZ COMPANY NZ LTD

You must enter your name in the box below and then press the button to review the proposed link...

Selected Parent is:  
5620913 - Fresh Choice Barringtons

Done

Internet

http://www... EN http://www... http://www...

Windows

SQL Serv... SQL Serv... SQL Serv...

stand

Figure 16

|   |  |                                     |   |                |                   |                 |
|---|--|-------------------------------------|---|----------------|-------------------|-----------------|
| <a href="#">http://www.accordo.co.nz/Project_MS/CAT.asp</a> - Microsoft Internet Explorer |  | File Edit View Favorites Tools Help | Address <a href="#">http://www.accordo.co.nz/Project_MS/CAT.asp</a> | Go             | www.ferrat        | Choose customer |
| <b>COMPLIANCE ANALYSIS TOOLSET</b>  |  | <b>4252468 - 121 XYZ COMPANY</b>    |   | Small Business | 1 of 8888<br>Next |                 |

### Check Proposed Link

Link proposed by: Wayne Jackson  
You are proposing the following link

**PARENT**  
 5620913 .A1 Company

**CHILD**  
 4252468 .A2 Company

You may record the type of link...

Variation of the parent name

and add any notes relating to this link...

|                      |                      |                                  |                                  |                                    |                                     |                                       |                               |                          |                               |                          |                         |                                   |                                   |                      |                           |                                  |                        |
|----------------------|----------------------|----------------------------------|----------------------------------|------------------------------------|-------------------------------------|---------------------------------------|-------------------------------|--------------------------|-------------------------------|--------------------------|-------------------------|-----------------------------------|-----------------------------------|----------------------|---------------------------|----------------------------------|------------------------|
| <a href="#">Home</a> | <a href="#">Menu</a> | <a href="#">MS Data Overview</a> | <a href="#">Customer Profile</a> | <a href="#">Compliance Summary</a> | <a href="#">Customer Agreements</a> | <a href="#">Customer Transactions</a> | <a href="#">Richard Other</a> | <a href="#">Licenses</a> | <a href="#">Reviews/Other</a> | <a href="#">Licenses</a> | <a href="#">Records</a> | <a href="#">Installation Data</a> | <a href="#">Reseller Profiles</a> | <a href="#">Link</a> | <a href="#">Customers</a> | <a href="#">Customer Summary</a> | <a href="#">Report</a> |
|----------------------|----------------------|----------------------------------|----------------------------------|------------------------------------|-------------------------------------|---------------------------------------|-------------------------------|--------------------------|-------------------------------|--------------------------|-------------------------|-----------------------------------|-----------------------------------|----------------------|---------------------------|----------------------------------|------------------------|

Done
start

## Agreement Modelling

Microsoft Excel -

File Edit View Insert Format Tools Data Window Help

Type a question for help

75%

7.0%

Insert Company Name:

Enter all details in highlighted in red

Allow for Price increases in Year 3 only

7.0%

| Existing  |          | Plans during term of agreement |        |          |        |        | Total |
|---|----------|--------------------------------|--------|----------|--------|--------|-------|
| # of Seats  | Split    | Year 1                         | Year 2 | Year 3   | Year 4 |        |       |
| Insert Current Number of Seats:                   | 100      | 1000                           | 100    | 150      | 150    | 1150   |       |
| Initial Position                                  |          | 10.00%                         | 10.00% | 10.00%   | 10.00% | 10.00% |       |
| Estimated Growth in relation to product purchases |          |                                |        |          |        |        |       |
| Enter details of current ownership position:      |          |                                |        |          |        |        |       |
| Office (Win & Mac)                                | 100      | 10.0%                          | 10     | 10       | 0      | 20     |       |
| Office Pro  | 40       | 40.0%                          | 40     | 40       | 35     | 75     |       |
| Office Std Upgrade to Office Pro                  |          |                                |        |          |        |        |       |
| Single App (Access) Upg to Office Pro             |          |                                |        |          |        |        |       |
|   |          |                                |        |          |        | 150    |       |
| Systems   |          |                                |        |          |        |        |       |
| Windows 9x  | 20       | 0.4%                           | 0      | 0        | 0      | 0      |       |
| Win NT Vista 4.0                                  | 80       | 80.0%                          | 0      | 0        | 0      | 0      |       |
| Upgrade to Windows 2000 Professional from Win 9x  |          |                                | 20     | 0        | 0      | 0      |       |
| Upgrade to Windows 2000 Professional from NT/9x   |          |                                | 60     | 0        | 0      | 0      |       |
| Win 2000 Pro (incl. OEM or PC) - 60 seats         | 20       | 0.2%                           | 10     | 10       | 0      | 100    |       |
|   |          |                                |        |          |        | 150    |       |
| Server CALs                                       |          |                                |        |          |        |        |       |
| BackOffice CAL                                    | Up to 10 | Year 1                         | Year 2 | Year 3   | Year 4 |        |       |
| Exchange CAL                                      | 0.0%     | 0                              | 0      | 0        | 0      | 0      |       |
| NT CAL  | 20       | 20.0%                          | 0      | 0        | 0      | 0      |       |
| SQL CAL   | 77       | 0.4%                           | 0      | 0        | 0      | 0      |       |
| ISA CAL   | 60       | 0.0%                           | 0      | 0        | 0      | 0      |       |
| ISA CAL   | 100.0%   | 0                              | 0      | 0        | 0      | 0      |       |
| Site Server CAL                                   | 0        | 0.0%                           | 0      | 0        | 0      | 0      |       |
| Windows Terminal Server CAL                       | 0        | 0.0%                           | 0      | 0        | 0      | 0      |       |
| SNA CAL   | 0        | 0.0%                           | 0      | 0        | 0      | 0      |       |
| Number of SQL Server Clusters Added               |          |                                |        |          |        |        |       |
| Version Upgrade Cycle                             |          |                                |        |          |        |        |       |
| Office Std  | Year 1   | Year 2                         | Year 3 | UA Yr1-3 | UA Yr3 |        |       |
| Office Pro  | 1        | 0                              | 1      | 1        | 1      |        |       |
| Windows NT/Windows 2000 Pro                       | 1        | 0                              | 1      | 1        | 1      |        |       |

Corporate Details / Summary of Options / Tables for Report / Charts for Report / Tools

Figure 18A

Microsoft Excel -

File Edit View Insert Format Tools Data Window Help

Type a question for help

75%

XYZ Company

| Option   |   | Description and Upgrade Schedule                          | Compliance New Lic | Compliance Mfco | Total Compliance | New Lic   | Upg Adv/ Vex Upgs | Enterprise Agmt Costs | Supporting Agmt Costs | Total Spend over 3 years |
|----------|---|---|--------------------|-----------------|------------------|-----------|-------------------|-----------------------|-----------------------|--------------------------|
| Option 4 | Office Pro, Win 200x, B/O CAL                       | Enterprise Agmt - Office only at fixed rate of \$430      | \$0                | \$0             | \$0              | \$11,408  | \$549,488         | \$1,388,750           | \$63,358              | \$2,011,005              |
| Option 5 | Enterprise Agmt - Office Pro UA on Windows and CALs | Windows and CALs handled as per UA                        | \$0                | \$0             | \$0              | \$0       | \$0               | \$1,880,825           | \$63,358              | \$1,944,183              |
| Option 6 | Ent Agmt - Office Pro/Win 200x Pro UA on CALs       | Enterprise Agmt - Office & Windows at fixed rate of \$569 | \$0                | \$0             | \$0              | \$200,248 | \$799,651         | \$474,075             | \$63,358              | \$1,537,332              |
| Option 7 | Ent Agmt - Windows 200x UA on Office and CALs       | Office and CALs handled as per UA                         | \$0                | \$0             | \$0              | \$0       | \$0               | \$0                   | \$0                   | \$0                      |

XYZ Company

| OPTION                            | Compliance Cost | YEAR 1    | YEAR 2    | YEAR 3    | Total Cost over 3 Years |
|-----------------------------------|-----------------|-----------|-----------|-----------|-------------------------|
| 1 - Select with UA                | \$0             | \$516,152 | \$545,221 | \$582,781 | \$1,644,154             |
| 2 - Select with VIP               | \$0             | \$433,769 | \$59,604  | \$895,518 | \$1,488,891             |
| 3 - EA Full Platform              | \$0             | \$895,840 | \$883,140 | \$900,320 | \$2,679,300             |
| 4 - EA Office                     | \$0             | \$584,048 | \$686,640 | \$730,318 | \$2,001,005             |
| 5 - EA Office & Win, UA on CALs   | \$0             | \$539,840 | \$684,190 | \$700,084 | \$1,924,113             |
| 6 - EA Win, UA on Office and CALs | \$0             | \$472,044 | \$532,771 | \$532,518 | \$1,537,332             |

Corporate Details / Summary of Options / Tables for Report / Charts for Report / Tools

Figure 18B



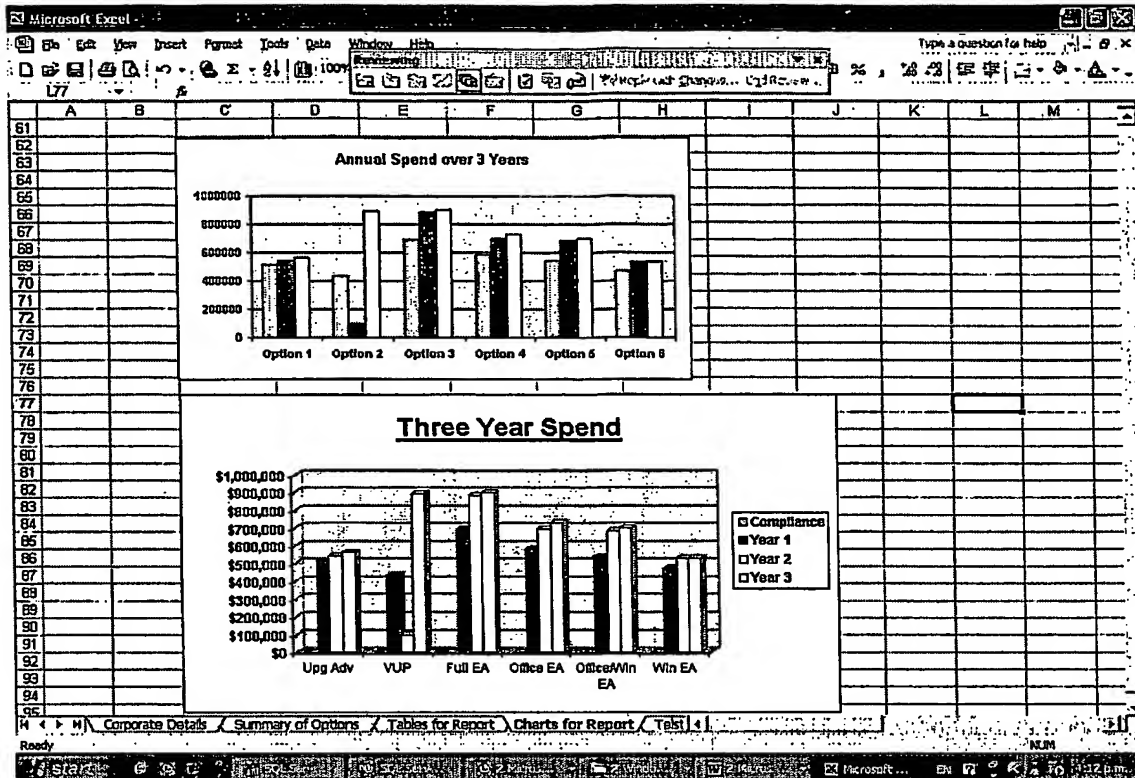


Figure 19A

Microsoft Excel -

XYZ Company

Total Number of Seats: 800

Percentage of Base Installed with Office Pro: 78.0%

Percentage of Base Installed with Office Std: 18.6%

Percentage of Base with Win NT Wkstin: 92.5%

**Outstanding Licenses - to be purchased**

| MS Product Code | Description                                  | Qty Installed | Qty Owned | Qty Required | Price Per   | Ext Price            |
|-----------------|--|---------------|-----------|--------------|-------------|----------------------|
| 021-02827       | Office 2000 Win32 English MVL                | 149           | 0         | 149          | \$ 775.00   | \$ 115,475.00        |
| 269-02409       | Office Pro 2000 Win32 English MVL            | 824           | 71        | 553          | \$ 931.00   | \$ 514,843.00        |
| 078-01168       | Project 2000 Win32 English VUP MVL           | 6             | 0         | 6            | \$ 328.00   | \$ 1,968.00          |
| 078-01161       | Project 2000 Win32 English MVL               | 83            | 14        | 63           | \$ 768.00   | \$ 48,258.00         |
| 068-00187       | Visio Standard 2000 Win32 English MVL        | 43            | 0         | 43           | \$ 278.00   | \$ 11,957.00         |
| 659-00253       | VStudio Pro 6.0 Win32 English MVL            |               |           | 2            | \$ 1,678.00 | \$ 3,352.00          |
| 238-0742V40VL   | WinNT Workstn 4.0 English PUP MVL Win95Win98 |               |           | 285          | \$ 368.00   | \$ 104,880.00        |
| 823-00305       | Windows Pro 2000 English PUP MVL             |               |           | 27           | \$ 388.00   | \$ 9,638.00          |
| 381-00933       | Exchange CAL 5.5 English MVL                 |               |           | 277          | \$ 112.00   | \$ 31,024.00         |
| 312-00803       | Exchange Svr 5.5 English MVL                 |               |           | 1            | \$ 894.00   | \$ 894.00            |
| 359-00600       | SQL CAL 2000 English MVL                     |               |           | 8            | \$ 303.00   | \$ 2,424.00          |
| 228-00763       | SQL Svr Standard Edtn 2000 English MVL       |               |           | 7            | \$ 1,378.00 | \$ 9,653.00          |
| 2272075ZV40VL   | WinNT CAL 4.0 English MVL                    |               |           | 27           | \$ 68.00    | \$ 1,782.00          |
| 2273276ZV40VL   | WinNT Sw 4.0 English MVL                     |               |           | 10           | \$ 1,328.00 | \$ 13,280.00         |
| <b>Totals</b>   |  |               |           |              |             | <b>\$ 869,876.00</b> |

Summary of Options / Tables for Report / Charts for Report

Figure 19B

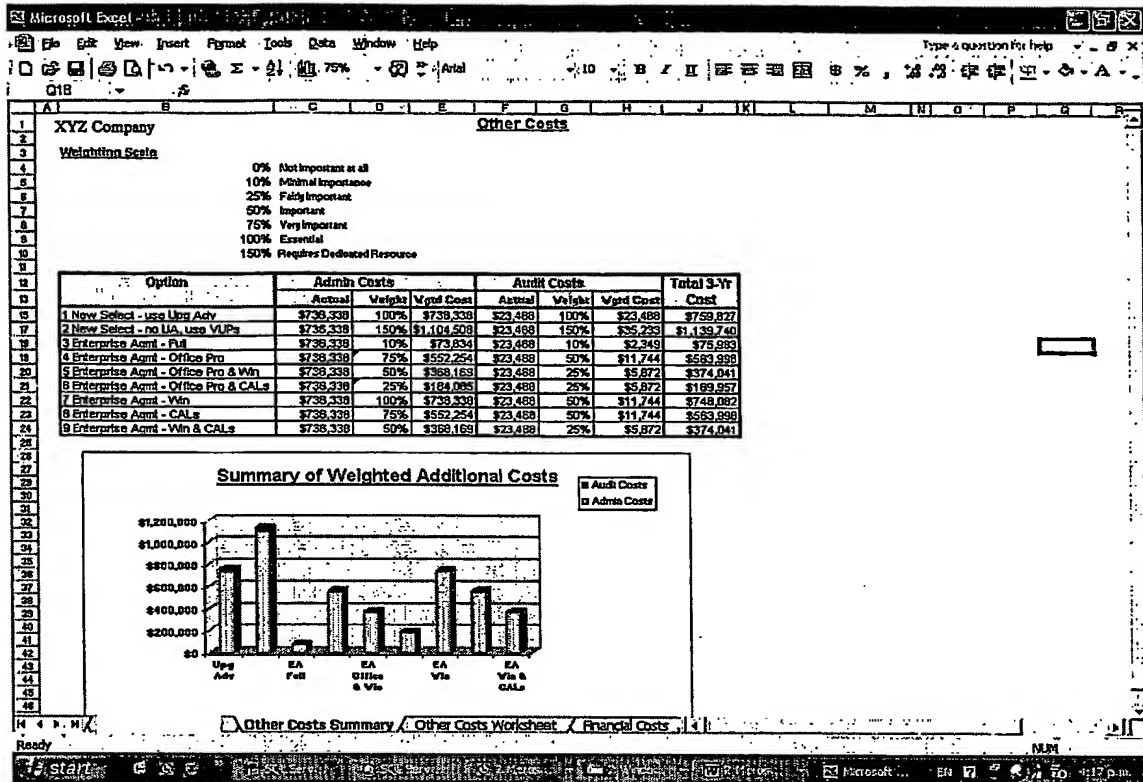


Figure 20A

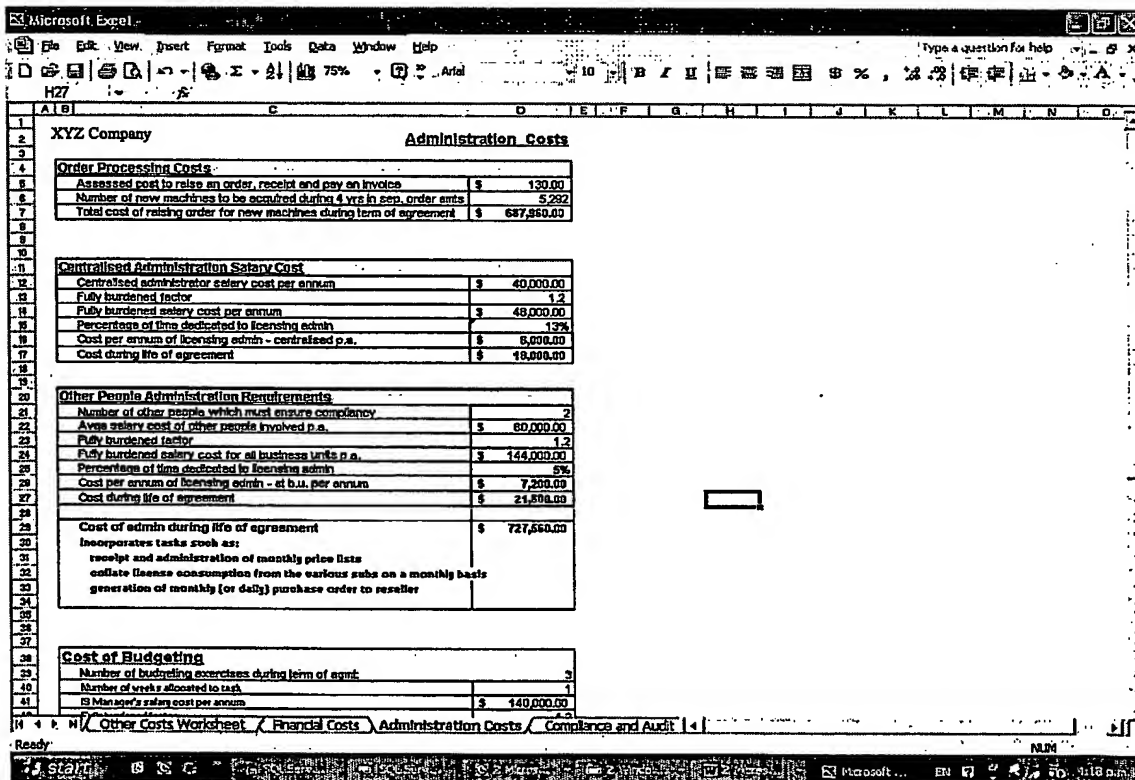


Figure 20B

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|   |  |   |             |        |        |        |        |                                  |             |             |
|---|--|---|-------------|--------|--------|--------|--------|----------------------------------|-------------|-------------|
| Microsoft Excel - [Workbook Name] - [File Name]     |  |   |             |        |        |        |        |                                  |             |             |
| File Edit View Insert Format Tools Data Window Help |  |   |             |        |        |        |        |                                  |             |             |
| Type a search term for help                         |  |   |             |        |        |        |        |                                  |             |             |
| B63   |  |   |             |        |        |        |        |                                  |             |             |
| 1   | XYZ Company  | Purchase under V5 and use MVLP for UA and later Purchases |             |        |        |        |        |                                  |             |             |
| 2   |  |   |             |        |        |        |        |                                  |             |             |
| 3   | All prices quoted at retail for comparison                                       |   |             |        |        |        |        | 118.000%                         |             |             |
| 4   |  |   |             |        |        |        |        | Allow for general price increase | 18.000%     |             |
| 5   | Upgrade Advantage - Product  | Upgrade Adv VLP (2 Year)                                  | Opening Qty | Year 1 | Year 2 | Year 3 | Year 4 | Year 5                           | Year 6      | Year 7      |
| 6   | Office Standard  | \$472.00  | 6092        | 6092   | 6092   | 6092   | 6092   | \$4,571,924                      | \$1,437,712 | \$1,437,712 |
| 7   | Office Professional  | \$565.00  | 1952        | 1952   | 1952   | 1952   | 1952   | \$1,763,579                      | \$561,440   | \$561,440   |
| 8   |  |   |             |        |        |        |        |                                  |             |             |
| 9   | Windows 95/3.X   | \$330.00  | 0           | 0      | 0      | 0      | 0      | \$0                              | \$0         | \$0         |
| 10  | Windows NT Workstation   | \$330.00  | 8044        | 8044   | 8044   | 8044   | 8044   | \$4,220,687                      | \$1,377,260 | \$1,377,260 |
| 11  |  |   |             |        |        |        |        |                                  |             |             |
| 12  | BackOffice Client Access   | \$237.00  | 0           | 0      | 0      | 0      | 0      | \$0                              | \$0         | \$0         |
| 13  | Windows 2000 Client Access   | \$41.00   | 1243        | 8044   | 8044   | 8044   | 8044   | \$524,388                        | \$164,902   | \$164,902   |
| 14  | Exchange Client Access   | \$91.00   | 551         | 8044   | 8044   | 8044   | 8044   | \$1,163,886                      | \$366,002   | \$366,002   |
| 15  | SMS Client Access  | \$57.00   | 0           | 0      | 0      | 0      | 0      | \$0                              | \$0         | \$0         |
| 16  | SQL Server Client Access   | \$197.00  | 650         | 2011   | 2011   | 2011   | 2011   | \$629,906                        | \$198,084   | \$198,084   |
| 17  | SNA Server Client Access   | \$61.00   | 0           | 0      | 0      | 0      | 0      | \$0                              | \$0         | \$0         |
| 18  |  |   |             |        |        |        |        | \$12,864,370                     | \$4,045,400 | \$4,045,400 |
| 19  |  |   |             |        |        |        |        |                                  |             |             |
| 20  |  |   |             |        |        |        |        |                                  |             |             |
| 21  |  |   |             |        |        |        |        |                                  |             |             |
| 22  | New Purchases - Product  |   | Opening Qty | Year 1 | Year 2 | Year 3 | Year 4 | Year 5                           | Year 6      | Year 7      |
| 23  | Office Standard  | \$695.00  | 0           | 0      | 0      | 0      | 0      | \$0                              | \$0         | \$0         |
| 24  | Office Professional  | \$836.00  | 0           | 0      | 0      | 0      | 0      | \$0                              | \$0         | \$0         |
| 25  | Office Std U/g to Office Pro   | \$163.00  | 0           | 0      | 0      | 0      | 0      | \$0                              | \$0         | \$0         |
| 26  | Single App (Access) U/g to Office Pro  | \$361.00  | 0           | 0      | 0      | 0      | 0      | \$0                              | \$0         | \$0         |
| 27  |  |   |             |        |        |        |        |                                  |             |             |
| 28  | Windows NT Workstation Upgrade   | \$338.00  | 8044        | 0      | 0      | 0      | 0      | \$0                              | \$0         | \$0         |
| 29  |  |   |             |        |        |        |        |                                  |             |             |
| 30  |  |   |             |        |        |        |        |                                  |             |             |
| 31  |  |   |             |        |        |        |        |                                  |             |             |
| 32  | BackOffice Client Access PUP from SQL  | \$251.00  | 0           | 0      | 0      | 0      | 0      | \$0                              | \$0         | \$0         |
| 33  | BackOffice Client Access PUP non SQL   | \$314.00  | 0           | 0      | 0      | 0      | 0      | \$0                              | \$0         | \$0         |
| 34  | General Work at Home V5 & UA / V5 & VUPs / OLP (Do Nothing) / EA R4 Flat / EA R4 |   |             |        |        |        |        |                                  |             |             |
| 35  |  |   |             |        |        |        |        |                                  |             |             |

Figure 21

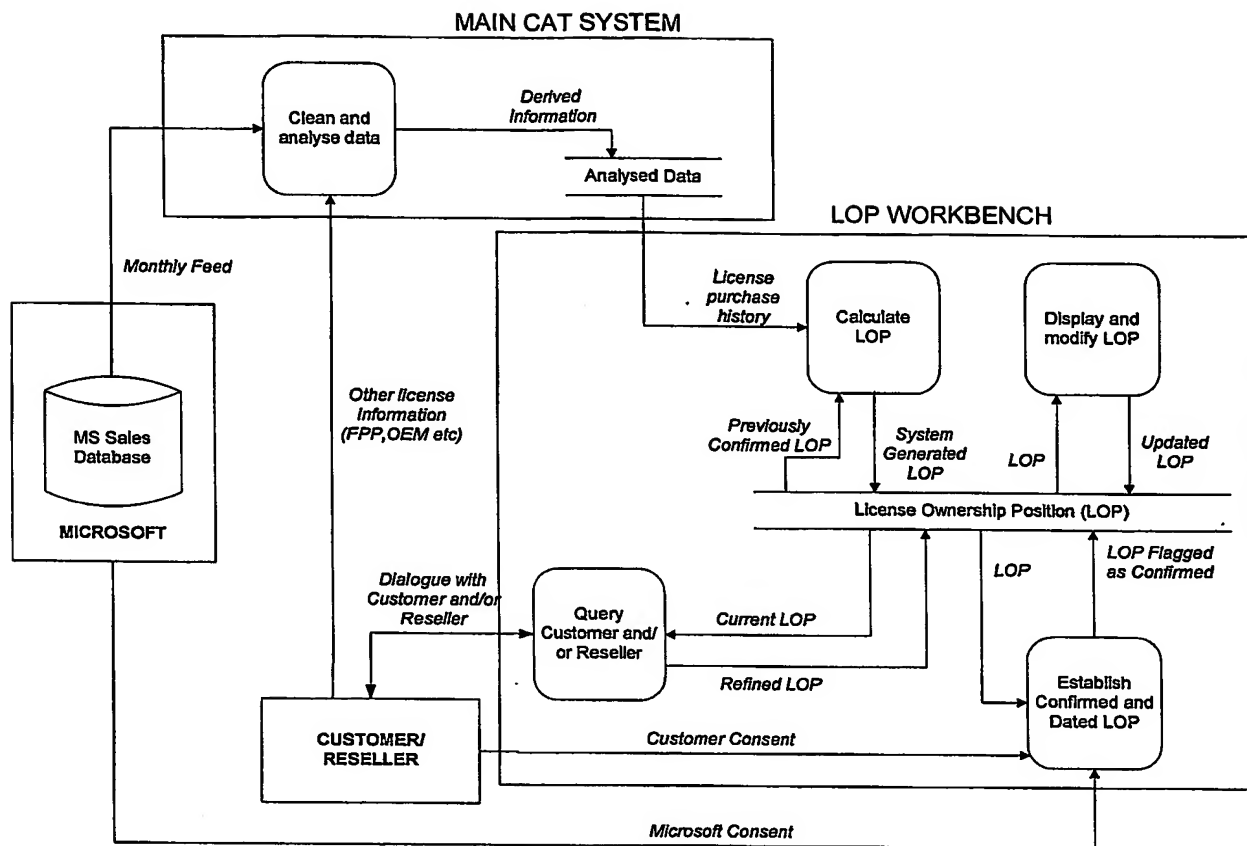


Figure 22

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http://accpower/CAT\_austr/CAT.asp - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Search Favorites Media

Address http://accpower/CAT\_austr/CAT.asp

Compliance Analysis Tool Set 557714 - XYZ COMPANY 1 of 20857 Next

Low Small Business 238

Choosia Customer

### Customer Compliance Report

**Choose Segment(s) to Include:**

☒ Small Business  
☒ Low Mid-Market  
☐ Corporate  
☐ Major

**Other Selection Criteria:**

Include organizations with transactions, live or expiring agreements in last  months

**Select Risk Factors and Assign Weightings**

(0 = no weighting      10 = max weighting)

|  | 0                     | 1                     | 2                     | 3                     | 4                     | 5                     | 6                     | 7                     | 8                     | 9                     | 10                    |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Inconsistent totals on enterprise-wide products    | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Estimated non-compliance on key products (\$)      | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Upgrades and maintenance with no identifiable base | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Version management - mixed or aging versions       | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Use of multiple resellers                          | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

**Rank the list in order of:**

Sort by estimated dollar value

**Specify Number of Customers to Display:**

Show Top...

Click Menu

File Edit View Favorites Tools Help

Back Forward Search Favorites Media

Address http://accpower/CAT\_austr/CAT.asp

Compliance Analysis Tool Set 557714 - XYZ COMPANY 1 of 20857 Next

Low Small Business 238

Choosia Customer

http://accpower/CAT\_austr/Compliance\_Menu.asp

Start

Figure 23

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File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Media

Address http://accpower/CAT\_Aust/CAT.asp

COMPLI-ICE ANALYSIS TOOLSET

5577714 - XYZ COMPANY

Low Small Business C.O. 1 of 28857 Next Customer

Save This Report

Customer Compliance Report

NOTES:  
1. The metrics shown in this report are calculated to provide an indication of the risk of non-compliance. Each metric can range from 0 to 100, with 100 representing the highest risk of non-compliance. The numbers are a primary intended for comparison purposes.  
2. The compliance details indicated for each customer in this report are indicative only. They are calculated based on the assumption that each customer is running the MS application indicated as being 'in use' on every seat, and also using seat counts which have not necessarily been independently validated.

Grand Total \$4,420,315

| Rank | CustID  | Customer Name | Weighted Ave | Totals | Value     | NoBase | Vers | Resell | Seat Count | Office Exch | Standard Products | NT | SNUS | Show Detail |
|------|---------|---------------|--------------|--------|-----------|--------|------|--------|------------|-------------|-------------------|----|------|-------------|
| 1    | 2562474 | A1 COMPANY    | 63           | 98     | \$353,480 | 58     | 20   |        | 856        | Y           | Y                 | Y  | Y    | Detail      |
| 2    | 1233410 | A2 COMPANY    | 58           | 67     | \$345,762 | 24     | 25   |        | 800        | Y           | Y                 | Y  | Y    | Detail      |
| 3    | 954908  | A3 COMPANY    | 70           | 67     | \$253,674 | 60     | 69   |        | 592        | Y           | Y                 | Y  | Y    | Detail      |
| 4    | 4276263 | A4 COMPANY    | 66           | 99     | \$239,220 | 36     | 60   |        | 600        | Y           | Y                 | Y  | Y    | Detail      |
| 5    | 2157067 | A5 COMPANY    | 61           | 60     | \$228,095 | 0      | 78   |        | 500        | Y           | Y                 | Y  | Y    | Detail      |
| 6    | 1026873 | A6 COMPANY    | 70           | 97     | \$205,700 | 45     | 40   |        | 400        | Y           | Y                 | Y  | Y    | Detail      |
| 7    | 1562945 | A7 COMPANY    | 58           | 90     | \$180,420 | 29     | 30   |        | 500        | Y           | Y                 | Y  | Y    | Detail      |
| 8    | 2056678 | A8 COMPANY    | 52           | 88     | \$187,545 | 0      | 25   |        | 400        | Y           | Y                 | Y  | Y    | Detail      |
| 9    | 1762260 | A9 COMPANY    | 78           | 85     | \$105,120 | 100    | 20   |        | 388        | Y           | Y                 | Y  | Y    | Detail      |
| 10   | 1239280 | A10 COMPANY   | 63           | 92     | \$180,540 | 6      | 59   |        | 350        | Y           | Y                 | Y  | Y    | Detail      |
| 11   | 4326776 | A11 COMPANY   | 69           | 90     | \$176,325 | 38     | 63   |        | 350        | Y           | Y                 | Y  | Y    | Detail      |
| 12   | 1658148 | A12 COMPANY   | 60           | 91     | \$100,300 | 0      | 20   |        | 400        | Y           | Y                 | Y  | Y    | Detail      |
| 13   | 1432667 | A13 COMPANY   | 52           | 85     | \$159,270 | 14     | 16   |        | 300        | Y           | Y                 | Y  | Y    | Detail      |
| 14   | 4947337 | A14 COMPANY   | 74           | 73     | \$150,350 | 37     | 35   |        | 350        | Y           | Y                 | Y  | Y    | Detail      |

http://accpower/CAT\_Aust/Compliance\_Metrics.asp

start

SQL Query Analyzer

SQL Server Enterprise Edition

Microsoft SQL Server 2000

Microsoft SQL Server 2000

Microsoft SQL Server 2000

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Figure 24

### Figure 25



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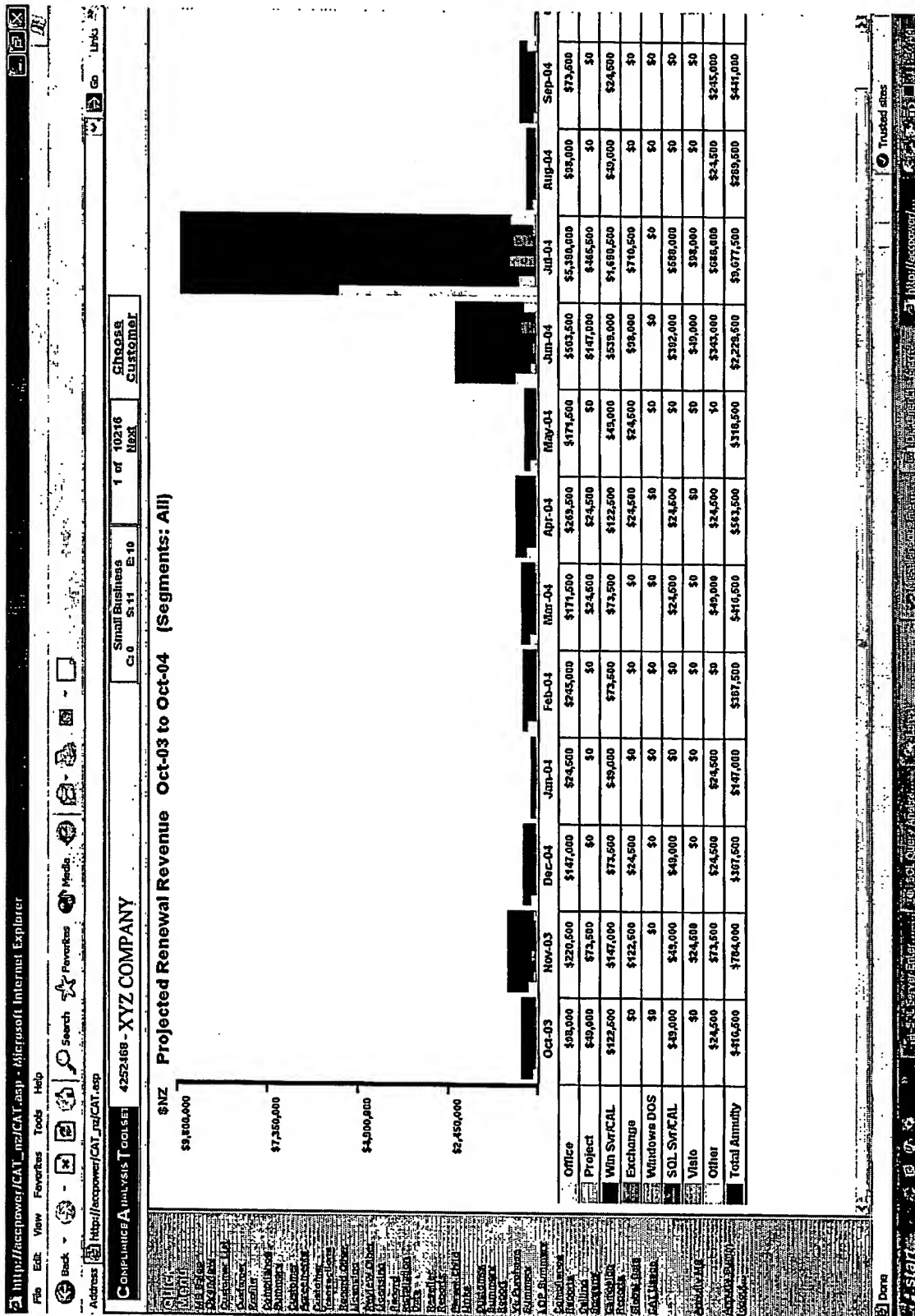


Figure 26

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http://accpower/CAT\_mz/CAT.asp - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Mode

Address http://accpower/CAT\_mz/CAT.asp

COMPANIES AVAILABLE TOOLS 4752468 - XYZ COMPANY 1 of 10216 10216 CHOOSE CUSTOMER

Small Business SA 10 10216

### Annuity Customer Report

**Choose Type of Report**

☒ Summary Report (Shows Expiry Date, Customer Name, Segment and Revenue)

☐ Detailed Report (Shows individual annuity transactions and agreement details)

**Choose Date Range**

Agreement to expire between (Inclusive): Month Year and Month Year

October 2003 and October 2003

**Choose Type of Annuity Program and License**

License Program: ☒ Open ☒ Select

License Type: ☐ L&SA ☐ SA Only ☐ Upgrade Adv ☐ Maintenance ☒ All Annuity

**Choose Customer Set**

☒ All Segments

☐ Low Small Business ☐ Lower Mid-Market ☐ Corporate

☐ Core Small Business ☐ Core Mid-Market ☐ Major

☐ Small Business ☐ Upper Mid-Market ☐ Strategic

Seat Count: Between 0 and 99999

**Choose Product Set**

☒ All Products

☐ Applications ☐ Office ☐ Windows Svr/CAL

☐ Server ☐ Project ☐ Exchange Svr/CAL

☐ Systems ☐ Volo ☐ SQL Svr/CAL

**Choose Rank Order**

Rank By: ☒ Expiry Date ☐ Customer Name ☐ Segment ☐ Revenue ☐ Reseller ☐ Product

Then By: ☐ Expiry Date ☐ Customer Name ☐ Segment ☐ Revenue ☐ Reseller ☐ Product

Show Report Reset All

Done

Figure 27

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| http://accpower/CAT_prj/CAT.asp - Microsoft Internet Explorer |               |             |                 |       |                                    |          |                                      |          |                         |
|---|---------------|-------------|-----------------|-------|------------------------------------|----------|--------------------------------------|----------|-------------------------|
| File  | Edit          | View        | Favorites       | Tools | Help                               | Back     | Forward                              | Search   | Stop                    |
| Address: http://accpower/CAT_prj/CAT.asp                      |               |             |                 |       |                                    |          |                                      |          |                         |
| COMPLIANCE ANALYSIS TOOLSET 4252468 - 121 AGENT XYZ COMPANY   |               |             |                 |       |                                    |          |                                      |          |                         |
| Small Business C:0 S:11 E:10 1 of 10216 Next Choose Customer  |               |             |                 |       |                                    |          |                                      |          |                         |
| Annuity Customer Report                                       |               |             |                 |       |                                    |          |                                      |          |                         |
| Expiry Date   | Customer Name | MS Sales ID | Segment         | Qty   | Product Name                       | Revenue  | Program License Type                 | Reseller | Agreement ID Master No. |
| 28-Oct-03   | A1 Company    | 019743      | Corporate       | 200   | SOL CAL                            | \$11,230 | Select Upgrade Advantage             |          | 5218028                 |
| 28-Oct-03   | A1 Company    | 019743      | Corporate       | 50    | Project                            | \$10,778 | Select Upgrade Advantage             |          | 5218028                 |
| 28-Oct-03   | A1 Company    | 019743      | Corporate       | 200   | Windows IIT CAL                    | \$2,200  | Select Upgrade Advantage             |          | 5218028                 |
| 28-Oct-03   | A1 Company    | 019743      | Corporate       | 2     | SOL Server Standard Edition        | \$513    | Select Upgrade Advantage             |          | 5218028                 |
| 28-Oct-03   | A1 Company    | 019743      | Corporate       | 2     | Windows IIT Server                 | \$454    | Select Upgrade Advantage             |          | 5218028                 |
| 28-Oct-03   | A1 Company    | 019743      | Corporate       | 1     | Exchange Server - Standard Edition | \$280    | Select Upgrade Advantage             |          | 5218028                 |
| 28-Oct-03   | A1 Company    | 019743      | Corporate       | 1     | Virtual C++ Professional Server    | \$206    | Select Upgrade Advantage             |          | 5218028                 |
| 31-Oct-03   | A2 Company    | 4501637     | Small Business  | 3     | Windows 2000 Server                | \$681    | Open Upgrade Advantage               |          | 0114255787              |
| 31-Oct-03   | A3 Company    | 5077812     | Small Business  | 2     | Project                            | \$431    | Open License/Software Assurance Pack |          | 0114255787              |
| 31-Oct-03   | A3 Company    | 5077812     | Small Business  | 10    | Windows 2000 Terminal Services CAL | \$308    | Open License/Software Assurance      |          | 142132162250310         |
| 31-Oct-03   | A3 Company    | 5077812     | Small Business  | 1     | Windows 2000 Server                | \$227    | Open License/Software Assurance      |          | 142132162250310         |
| 31-Oct-03   | A4 Company    | 4016142     | Small Business  | 19    | Office                             | \$3,127  | Open Upgrade Advantage               |          | 0114232211              |
| 31-Oct-03   | A4 Company    | 4016142     | Small Business  | 6     | Office Professional                | \$1,225  | Open Upgrade Advantage               |          | 0114232211              |
| 31-Oct-03   | A5 Company    | 2333653     | Small Business  | 5     | Windows 2000 Terminal Services CAL | \$154    | Open Software Assurance              |          | 142303592250310         |
| 31-Oct-03   | A5 Company    | 2333653     | Small Business  | 8     | Exchange CAL                       | \$128    | Open Software Assurance              |          | 0114276973              |
| 31-Oct-03   | A5 Company    | 2333653     | Small Business  | 6     | Windows 2000 CAL                   | \$55     | Open Software Assurance              |          | 0114276973              |
| 31-Oct-03   | A5 Company    | 2333653     | Small Business  | 5     | Windows 2000 CAL                   | \$55     | Open Software Assurance              |          | 0114276973              |
| 31-Oct-03   | A5 Company    | 2333653     | Small Business  | 5     | Exchange CAL                       | (\$128)  | Open Software Assurance              |          | 0114276973              |
| 31-Oct-03   | A5 Company    | 2333653     | Small Business  | 5     | Windows 2000 Terminal Services CAL | (\$140)  | Open Software Assurance              |          | 0114276973              |
| 31-Oct-03   | A6 Company    | 2531267     | Core Mid-Market | 1     | Windows XP Professional            | \$83     | Open Upgrade/Software Assurance Pack |          | 0114240003              |
| 31-Oct-03   | A7 Company    | 4780547     | Core Mid-Market | 1     | SOL Server Standard Edition        | \$257    | Open Software Assurance              |          | 142261032250310         |
| 31-Oct-03   | A7 Company    | 4780547     | Core Mid-Market | 1     | SOL Server Standard Edition        | \$257    | Open Software Assurance              |          | 142261032250310         |
| 31-Oct-03   | A7 Company    | 4780547     | Core Mid-Market | 1     | Windows 2000 Server                | \$227    | Open Upgrade Advantage               |          | 0114273486              |

Figure 28

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